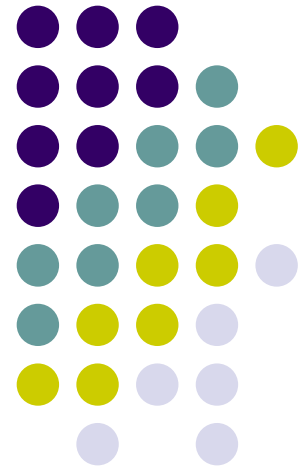
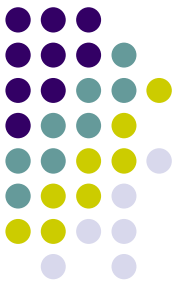


California Statewide Reference: a Proposed Design

“Bring to bear the willingness, capacity, and ability to continue to morph into ever-relevant, evidenced-based new iterations of service.”

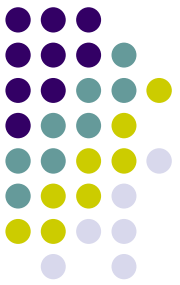


Proposed Design: A Pathway...



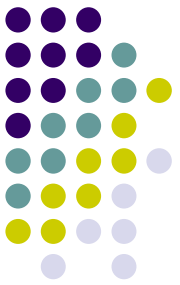
- Out of the “box” you are in...
- into a model that improves service now and repositions CA for future reference
- toward an evidence-based package of services that serve Californians well into the future

The Box



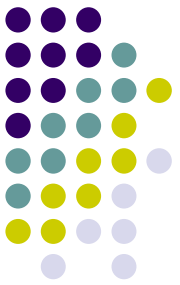
- Declining volume of CLSA reference questions
- Perception that “reference is dead”
- What to do about CLSA reference centers and staffing
- AskNow service issues: staffing, quality assurance, questions of a local nature, technical problems, public appeal, cost benefit
- Database cost vs. use
- Leadership void re: web-based service development

Proposed Model



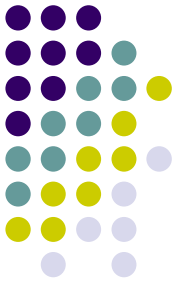
- Improves what exists
- Establishes a platform for fashioning successive model iterations
- Repositions CA for dynamic model in contrast to a static model
- Delivers service as well as planning and leadership
 - Data collection, analysis, benchmarking, needs assessment
 - Market research, applied research that would establish what would actually fill a niche
 - Customer-driven
- Finds that intersection of what you do really well and what the public wants
- takes better advantage of the opportunities that are presented now and into the future

Evidenced-based Package Of Services



- Conduct ongoing market research
- Clearly define the niche
- Make data-driven choices
- Properly package those services that are viable
- Emphasize customer-centered results
- Create tools that help the consumer be independent
- Consistently deliver professional work
- Make the information usable: customized, personalized, collaborative, with a feedback loop
- Include focus on high profile targets: e.g., child development, gang prevention, health & wellness

Model Components



- A single virtual Portal for CA public and CA librarian question “sessions”
- A single CLSA reference service plan
- A manager/administrator for the cadre of services (sessions, document delivery, product development)
- A client team to steer the development agenda



PROPOSED MODEL ESSENTIALS

● Leadership

- Planning: data, assessment, benchmarking, Market research
- Coordination, integration, evaluation, reintegration
- Drive agenda for development; Development/Funding partnerships

● Management

- The transition has to be managed
- Quality Assurance, Customer Care
- Marketing, publicity

● R/D, innovation, experimentation, incubation

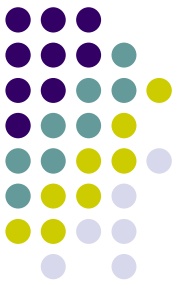
- Web-2.0 and beyond
- Project-centered
- Bring best practices and research to bear
- Local, national, international collaboration

● “Reference” Services

- Customer sessions: question defining, coaching, guidance, answers, follow-up, follow-through
- Good customer service, accuracy, timeliness, cost-effectiveness
- Database support: databases and database help for customers; document delivery

● Training

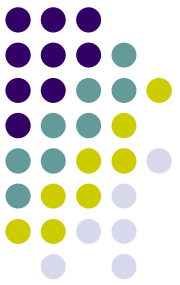
- Transcript analysis and feedback, accountability
- By InfoPeople according to specific desired results



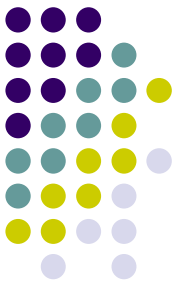
Statewide Reference Service

- Provide a Single Portal for CA Public and Librarian “sessions”
 - Service icon on CA libraries and State Library websites, etc.
 - Intake method = email, chat, IM, telephone, fax, other
 - Continue with OCLC QuestionPoint software for now
 - track developments, i.e., other vendors, products, experimentation with open source option
 - Refer questions needing more research to complex folder for 24 hour turn-around or according to client timeline
 - Coordinate protocol for questions requiring the collections of LAPL, San Diego, Fresno, San Francisco, etc.
 - Use “any and all means” to meet desired results
- Desired results
 - Good customer service, accuracy, timeliness, customer care
 - The customer wants an answer not a lecture
 - Not making the customer feel inadequate
- Use various staffing options to achieve the desired results
 - Staff with CLSA Reference Personnel, virtually
 - Supplement with contract personnel, CA Libraries, commercial services, etc.
 - Use successful CLSA Reference practices: e.g., host relationships, subject and location stringers
 - Train and select personnel for the desired results
 - Customer service skills, age-related skills, efficiency skills, content skills, referral skills
- Use Selected databases (e.g. LAPL, other non duplicative)
 - Provide document delivery
 - Possibility of public databases with federated searching

HOW IT WOULD WORK AT THE START

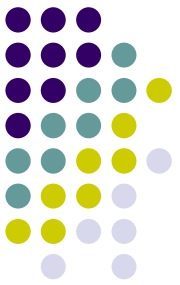


- Public accesses *Service* by telephone, fax, email, chat, instant messaging, etc.
- CA Librarians' access is through the web Portal
- “Sessions” include clarifying, consulting, coaching, guiding, answering, referring, follow-up, follow-through
- Sessions with clients through the Portal are managed virtually with *QuestionPoint* software
- Staff resourcefully improvises
 - “Toolkit” includes option to use online services
 - Exercises professional judgment within an established framework
 - Established framework is under continuous improvement
- Complex questions handled by Service Follow-Up Team
 - Handled side-by-side with other questions
 - Uses resources of the LAPL, other libraries, stringers, commercial services
- Service staff have access to First Source databases
 - Provide document delivery to client



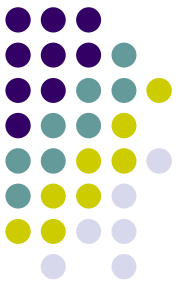
DEVELOPMENT AGENDA

- Better understanding/incorporation of user needs, preferences, and behaviors
- Quality improvement across-the-board
 - Evaluation, i.e., data, metrics, value sets for decision-making
 - Effective communication and relationship-building
 - Marketing and public relations
- Development in a Web 2.0 and Beyond environment:
 - Interactivity, social networking
 - Diverse learning styles
- Service development priorities, e.g.,
 - English language learners, print-impaired, other
 - Informed by customer input, market research



ORGANIZATIONAL STRUCTURE

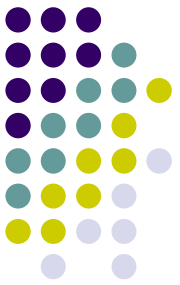
- Project Manager or leader team
 - Change management
 - Planning/evaluation/research
 - Advocacy, development/funding partnerships
- Client Team
 - State Library, CLSA System representatives
- State Library contracts w/provider(s) to Manage Service



HOW TO GET THERE

- Start by analyzing whether state funding of reference (CLSA) could support the transitional model
- Think in terms of a 3-4 year time horizon
 - In ever-transitioning phases of development
 - CLSA, LSTA, and public/private/corporate funding partnerships
- Bring to bear the willingness, capacity, and ability to continue to morph into ever-relevant, evidenced-based new iterations of service.

The ability to morph is what protects the investment!



FUNDING

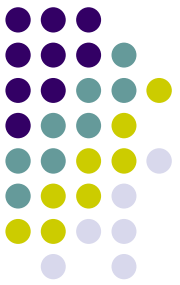
- Investigate using CLSA Reference allocations as the base of funding for the proposed model
- Use LSTA funds to enable the leadership and development agenda
- Use grants and partnerships to advance the development agenda
 - languages other than English
 - print-impaired
 - and other special needs



CURRENT FUNDING SNAPSHOT: POTENTIAL FOR REALLOCATION

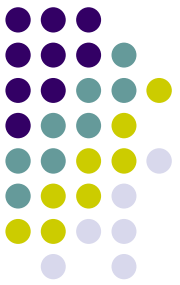
Summary: 2006/07 Reference Funding					
		CLSA	Local	LSTA	Grand Total
CLSA Reference: Personnel		\$ 890,000			
contract services, database subscriptions, other		\$ 410,000			
local funds for CLSA Reference			\$ 300,000		
First Source	LAPL databases			\$ 313,500	
QuestionPoint/24/7	software and network			\$ 200,000	
Totals 2006/07		\$ 1,300,000	\$ 300,000	\$ 513,500	\$2,113,500

- Right-size Service staffing over time as appropriate
- Local contributions can continue to pay for regional databases, voluntarily contribute to local Web 2.0 and beyond services development, be reclaimed by local libraries, or some of each
- OCLC costs could be reduced and or redirected into “initial agenda” projects



PROJECT STATUS

- Phase 1: Preparation
- Phase 2: Fact-finding
- Phase 3: Design
- Phase 4: Ramp-up to Implementation
 - CLSA stakeholder comment and implementation suggestions
 - Initial search for qualified candidates
 - Form the client team
 - Select Project Manager
 - Plan for project implementation



WRAP-UP: OPPORTUNITY!

- Reference as we have practiced it may be dead, but the possibility of transforming it is very much alive
- A new reference agenda could refocus and re-energize, take it to a new level
- The proposed approach leverages the long-term gains of the CLSA Reference Program
- Current reference staff can play a pivotal role in transforming services
- All three service elements can be improved and made more interdependent (next level reference, virtual reference, databases)
- CLSA funds may be repurposed to do this, along with other funding
- While moving ahead, the model/cost can continue to be examined, rethought, improved, morphed

Questions and Comments

